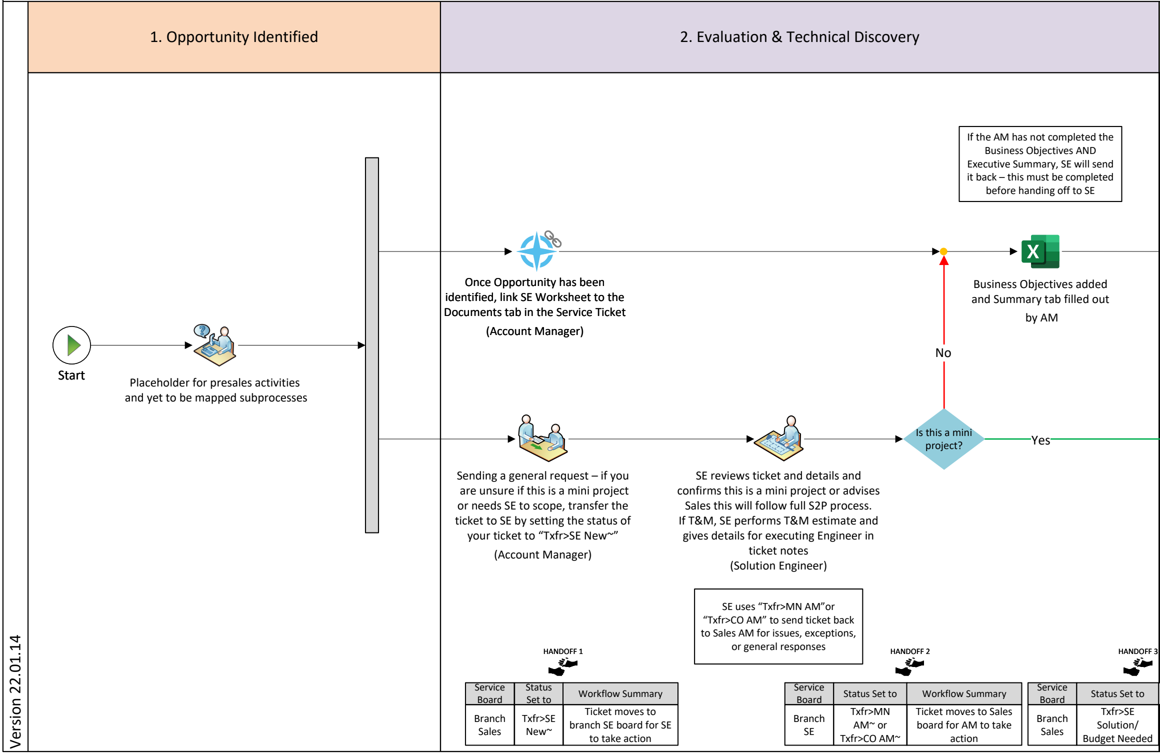
Sales-to-Project (S2P) with ScopeStack

Version 22.01.14



1. Opportunity Identified

Start

Placeholder for presales activities and yet to be mapped subprocesses

2. Evaluation & Technical Discovery

Once Opportunity has been identified, link SE Worksheet to the Documents tab in the Service Ticket

(Account Manager)

If the AM has not completed the Business Objectives AND Executive Summary, SE will send it back – this must be completed before handing off to SE

Business Objectives added and Summary tab filled out by AM

Sending a general request – if you are unsure if this is a mini project or needs SE to scope, transfer the ticket to SE by setting the status of your ticket to “Txfr>SE New~”

(Account Manager)

SE reviews ticket and details and confirms this is a mini project or advises Sales this will follow full S2P process.
If T&M, SE performs T&M estimate and gives details for executing Engineer in ticket notes
(Solution Engineer)

Is this a mini project?

No

Yes

SE uses “Txfr>MN AM”or “Txfr>CO AM” to send ticket back to Sales AM for issues, exceptions, or general responses

HANDOFF 1

Service Board	Status Set to	Workflow Summary
Branch Sales	Txfr>SE New~	Ticket moves to branch SE board for SE to take action

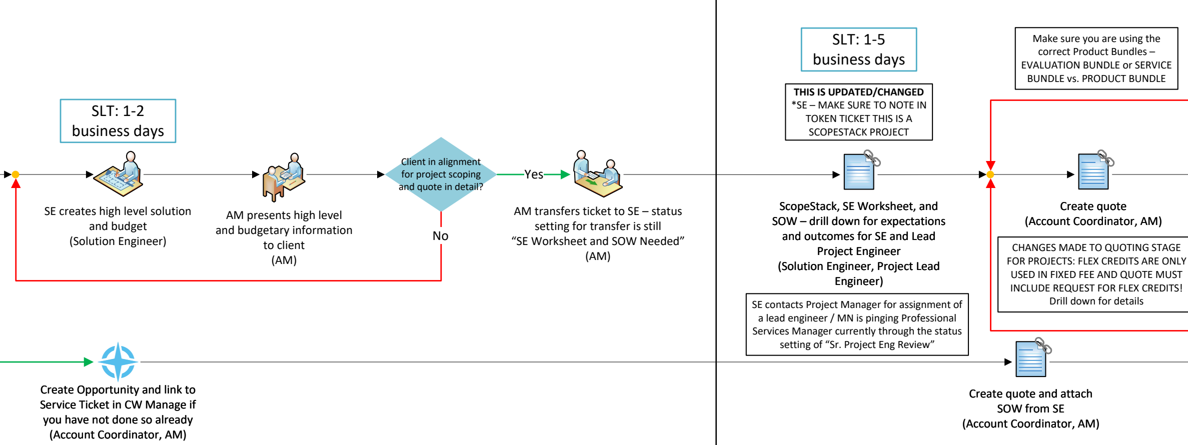
HANDOFF 2

Service Board	Status Set to	Workflow Summary
Branch SE	Txfr>MN AM~ or Txfr>CO AM~	Ticket moves to Sales board for AM to take action

HANDOFF 3

Service Board	Status Set to
Branch Sales	Txfr>SE Solution/ Budget Needed

3. Qualification of Solution & Budget



SLT: 1-2 business days

SE creates high level solution and budget
(Solution Engineer)

AM presents high level and budgetary information to client
(AM)

Client in alignment for project scoping and quote in detail?

Yes

No

AM transfers ticket to SE – status setting for transfer is still “SE Worksheet and SOW Needed”
(AM)

Create Opportunity and link to Service Ticket in CW Manage if you have not done so already
(Account Coordinator, AM)

SLT: 1-5 business days

THIS IS UPDATED/CHANGED
*SE – MAKE SURE TO NOTE IN TOKEN TICKET THIS IS A SCOPESTACK PROJECT

ScopeStack, SE Worksheet, and SOW – drill down for expectations and outcomes for SE and Lead Project Engineer
(Solution Engineer, Project Lead Engineer)

SE contacts Project Manager for assignment of a lead engineer / MN is pinging Professional Services Manager currently through the status setting of “Sr. Project Eng Review”

Make sure you are using the correct Product Bundles – EVALUATION BUNDLE or SERVICE BUNDLE vs. PRODUCT BUNDLE

Create quote
(Account Coordinator, AM)

CHANGES MADE TO QUOTING STAGE FOR PROJECTS: FLEX CREDITS ARE ONLY USED IN FIXED FEE AND QUOTE MUST INCLUDE REQUEST FOR FLEX CREDITS! Drill down for details

Create quote and attach SOW from SE
(Account Coordinator, AM)

Workflow Summary
Ticket moves to branch SE board for SE to take action

HANDOFF 4

Service Board	Status Set to	Workflow Summary
Branch SE	Txfr>MN AM~ or Txfr>CO AM~	Ticket moves to Sales board for AM to take action and present HL

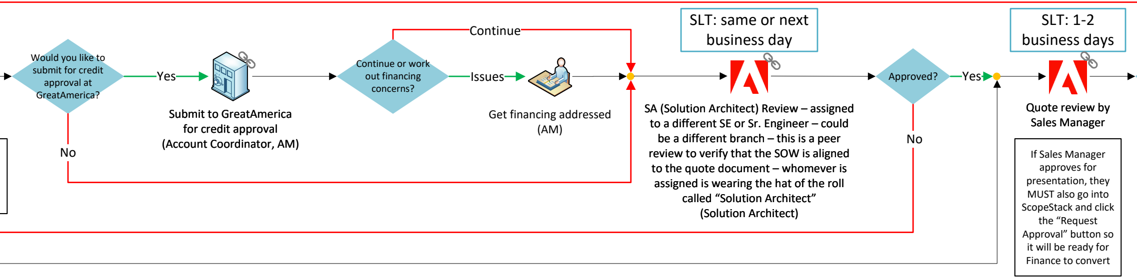
HANDOFF 5

Service Board	Status Set to	Workflow Summary
Branch Sales	Txfr>SE Worksheet and SOW Needed~	Ticket moves to branch SE board for SE to work on SE Worksheet, SOW, SE labor scoping and WBS (ScopeStack)

HANDOFF 6

Service Board	Status Set to	Workflow Summary
Branch SE	Txfr>MN AM~ or Txfr>CO AM~	Ticket moves to Sales board for AM to take action and prepare quote

4. Proposal Generation & Presentation



Would you like to submit for credit approval at GreatAmerica?

Yes

No

Submit to GreatAmerica for credit approval (Account Coordinator, AM)

Continue or work out financing concerns?

Continue

Issues

Get financing addressed (AM)

SLT: same or next business day

SA (Solution Architect) Review – assigned to a different SE or Sr. Engineer – could be a different branch – this is a peer review to verify that the SOW is aligned to the quote document – whomever is assigned is wearing the hat of the roll called “Solution Architect” (Solution Architect)

Approved?

Yes

No

SLT: 1-2 business days

Quote review by Sales Manager

If Sales Manager approves for presentation, they MUST also go into ScopeStack and click the “Request Approval” button so it will be ready for Finance to convert

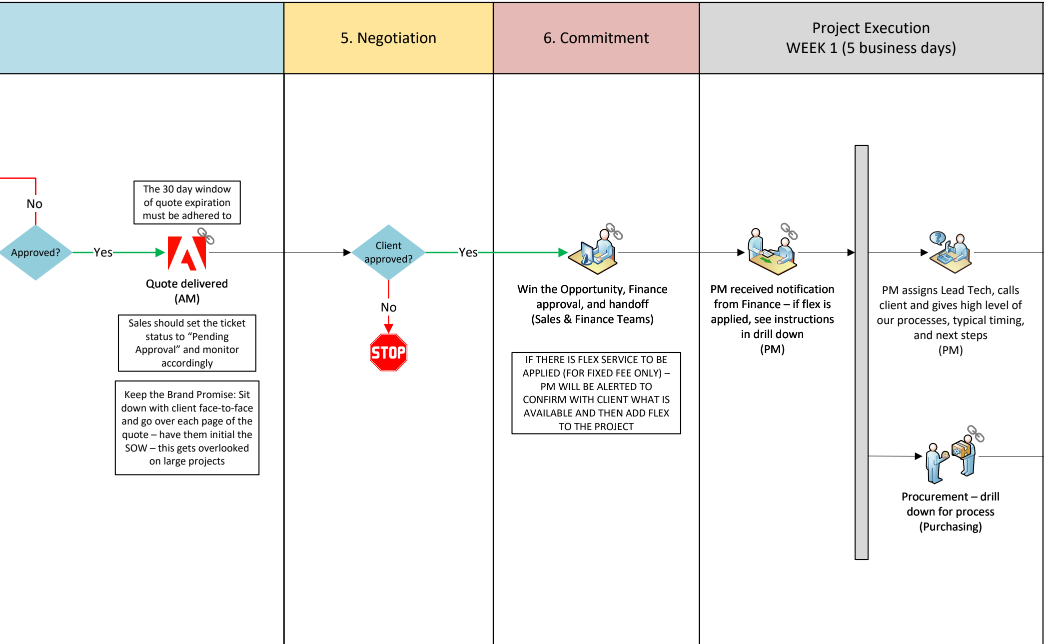
If you have already received an approval status from GA and your quote has been updated, send an update email to ctgsouthops@accountservicing.com with noted changes

HANDOFF 7

Service Board	Status Set to	Workflow Summary
Branch Sales	Txfr>SA Approval Needed	Ticket moves to branch SE board for Solution Architect approval *cannot be the SE who designed the solution

HANDOFF 8

Service Board	Status Set to	Workflow Summary
Branch SE	SA Proposal Approved	Ticket moves to branch Sales board at status of “SA Proposal Approved”



5. Negotiation

6. Commitment

Project Execution
WEEK 1 (5 business days)

No

Approved?

Yes

The 30 day window of quote expiration must be adhered to

Quote delivered (AM)

Sales should set the ticket status to "Pending Approval" and monitor accordingly

Keep the Brand Promise: Sit down with client face-to-face and go over each page of the quote – have them initial the SOW – this gets overlooked on large projects

Client approved?

Yes

No

Win the Opportunity, Finance approval, and handoff (Sales & Finance Teams)

IF THERE IS FLEX SERVICE TO BE APPLIED (FOR FIXED FEE ONLY) – PM WILL BE ALERTED TO CONFIRM WITH CLIENT WHAT IS AVAILABLE AND THEN ADD FLEX TO THE PROJECT

PM received notification from Finance – if flex is applied, see instructions in drill down (PM)

PM assigns Lead Tech, calls client and gives high level of our processes, typical timing, and next steps (PM)

Procurement – drill down for process (Purchasing)

HANDOFF 9

Service Board	Status Set to	Workflow Summary
Branch Sales	Sales Manager Approved	Ticket stays on board, but quote is now ready for Sales presentation to client

HANDOFF 10

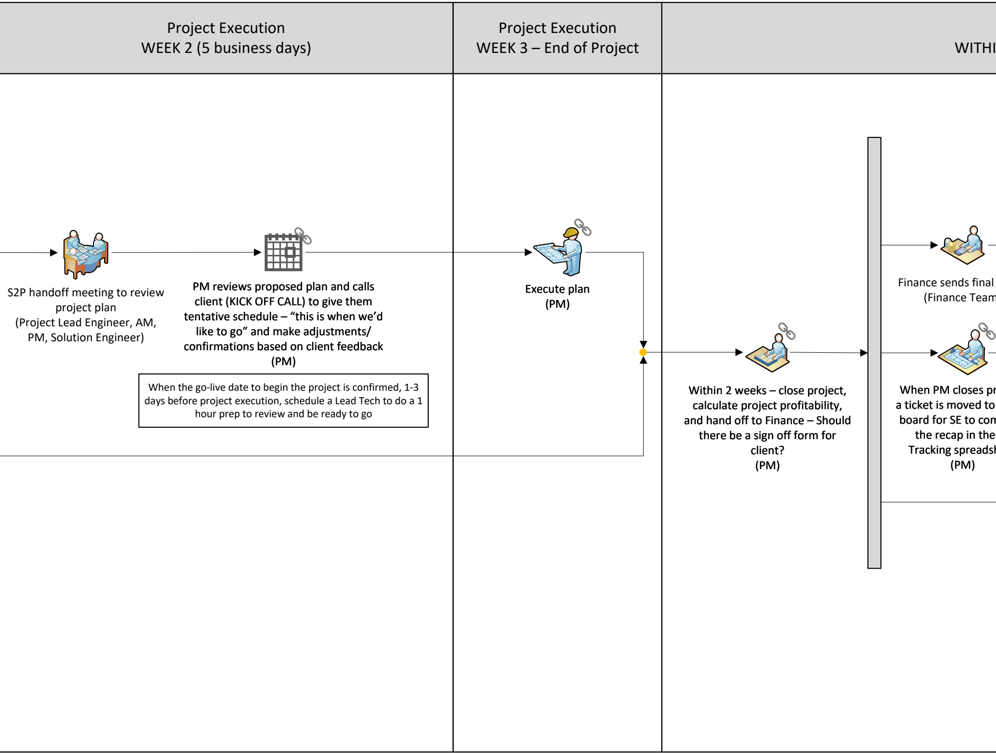
Service Board	Status Set to	Workflow Summary
Branch Sales	Txfr> Finance*	Ticket moves to Finance for processing Won Opportunity, SO, & project creation

HANDOFF 11

Service Board	Status Set to	Workflow Summary
Finance	Txfr> Purchasing	Ticket moves to Purchasing board for procurement

HANDOFF 12

Service Board	Status Set to	Workflow Summary
Finance		Email created and sent by Finance to PM with Token Ticket info, alerting the project is ready for takeover



Project Execution
WEEK 2 (5 business days)

Project Execution
WEEK 3 – End of Project

WITHI

S2P handoff meeting to review project plan
(Project Lead Engineer, AM, PM, Solution Engineer)

**PM reviews proposed plan and calls client (KICK OFF CALL) to give them tentative schedule – "this is when we'd like to go" and make adjustments/ confirmations based on client feedback
(PM)**

When the go-live date to begin the project is confirmed, 1-3 days before project execution, schedule a Lead Tech to do a 1 hour prep to review and be ready to go

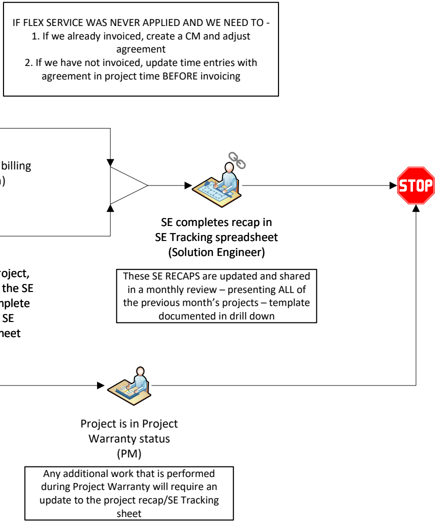
**Execute plan
(PM)**

**Within 2 weeks – close project, calculate project profitability, and hand off to Finance – Should there be a sign off form for client?
(PM)**

Finance sends final
(Finance Team

**When PM closes pr
a ticket is moved to
board for SE to com
the recap in the
Tracking spreadsh
(PM)**

Project Execution
N 2 WEEKS AFTER CLOSE



IF FLEX SERVICE WAS NEVER APPLIED AND WE NEED TO -
1. If we already invoiced, create a CM and adjust agreement
2. If we have not invoiced, update time entries with agreement in project time BEFORE invoicing

SE completes recap in
SE Tracking spreadsheet
(Solution Engineer)

These SE RECAPS are updated and shared in a monthly review – presenting ALL of the previous month's projects – template documented in drill down

Project is in Project
Warranty status
(PM)

Any additional work that is performed during Project Warranty will require an update to the project recap/SE Tracking sheet

You may leave the Estimate field blank in the Opportunity until you get to the Budgeting tab in the SE Worksheet

As you complete this template, it is to be saved in the following DFS folder: \\mtp.local\root\clients\<mtpsite(MN/CO)>\<cwclientid>\<filename>
The file name should be: client_ticket#_project description_project year

Select “Link to Local File” and then you can use the “Browse” option to select the file

Start

Create an Opportunity if one does not already exist for this project to be quoted.

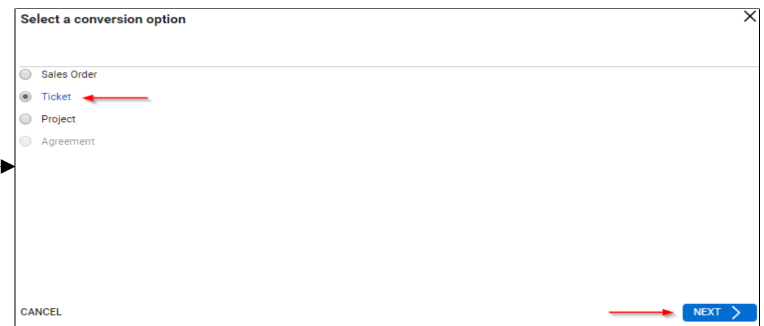
Create Service Ticket (OR link existing ticket) from the Opportunity using the Convert option – see drill down below

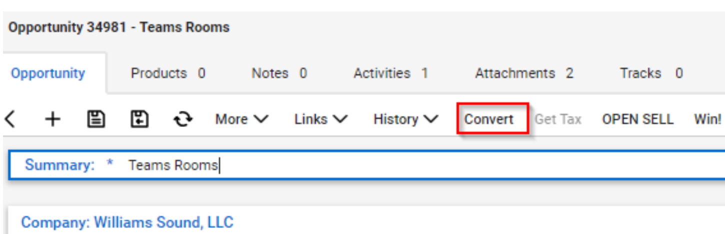
Open the link and save the worksheet template as an .xlsm Excel file

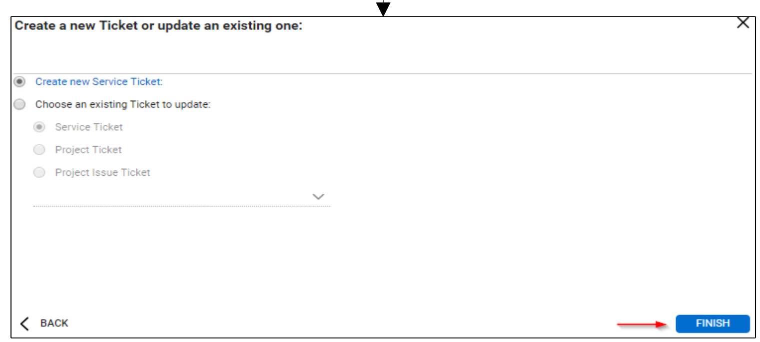
Link the worksheet document to the Service Ticket “Attachments” tab

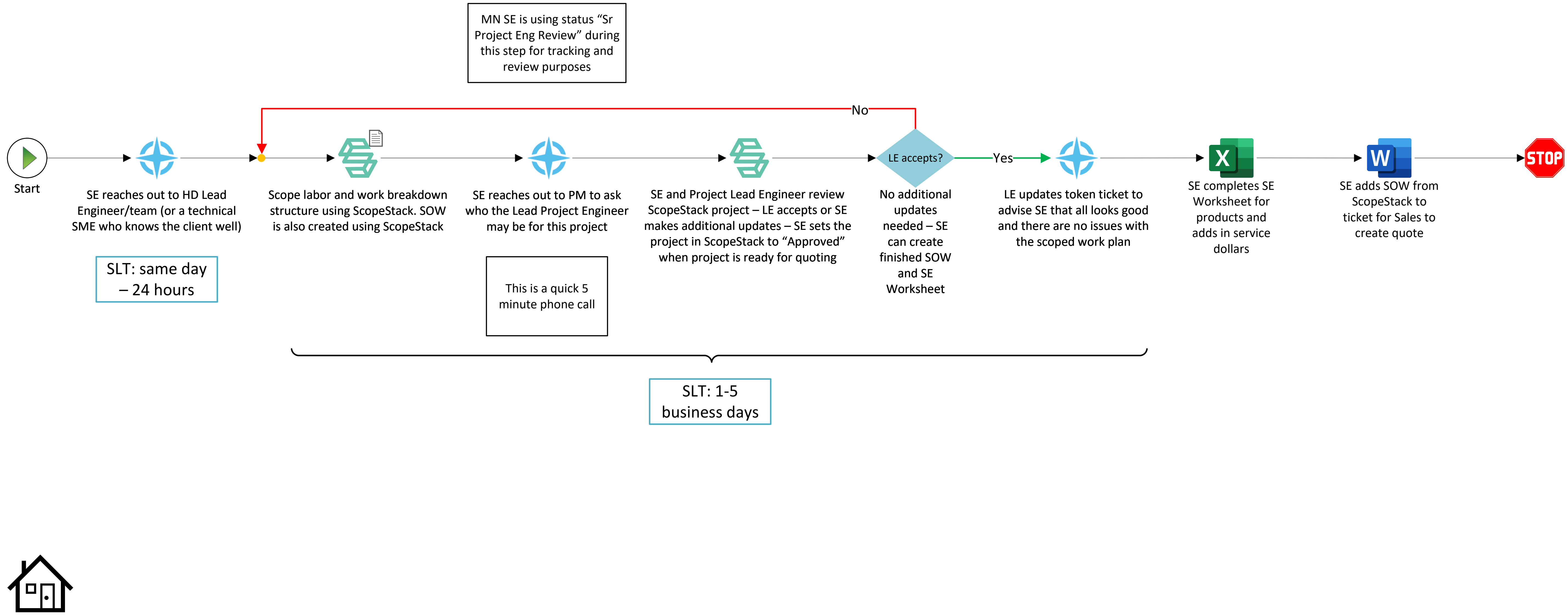
STOP

1. From the Opportunity header click “Convert”
2. Select “Ticket” and then click “Next”
3. If you do NOT already have a Service Ticket to link to, select “Create new Service Ticket” then click “Next”. If you already have a Service Ticket and need to link it, then select “Choose an existing Service Ticket to update” and click “Next”
4. You are prompted to select documents to copy, leave all selected and click “Finish”



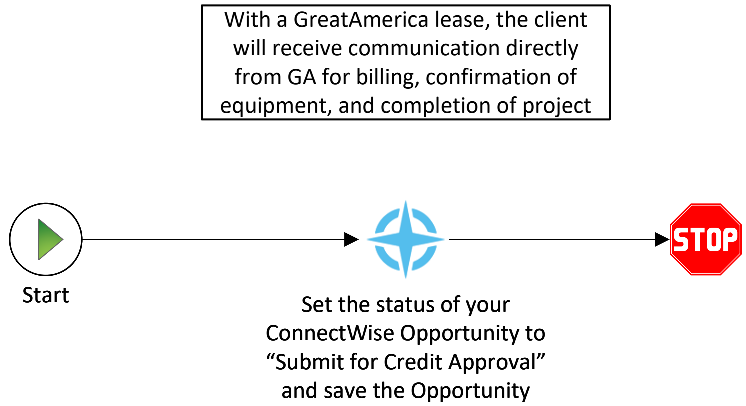




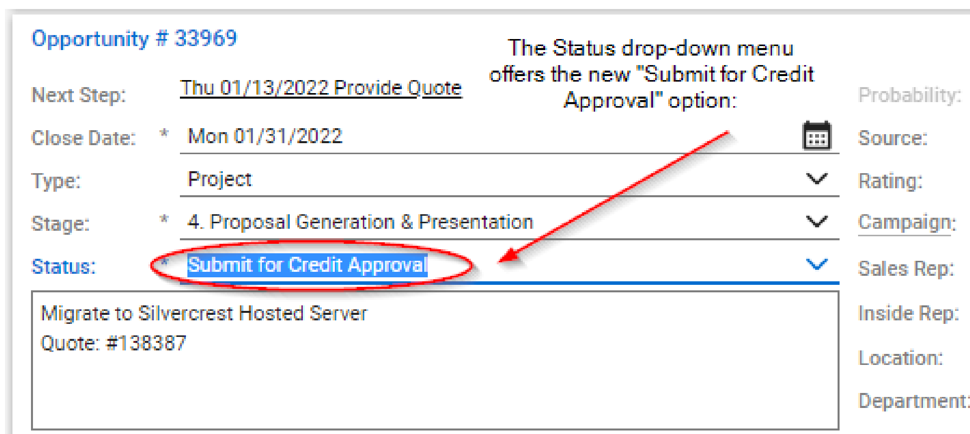


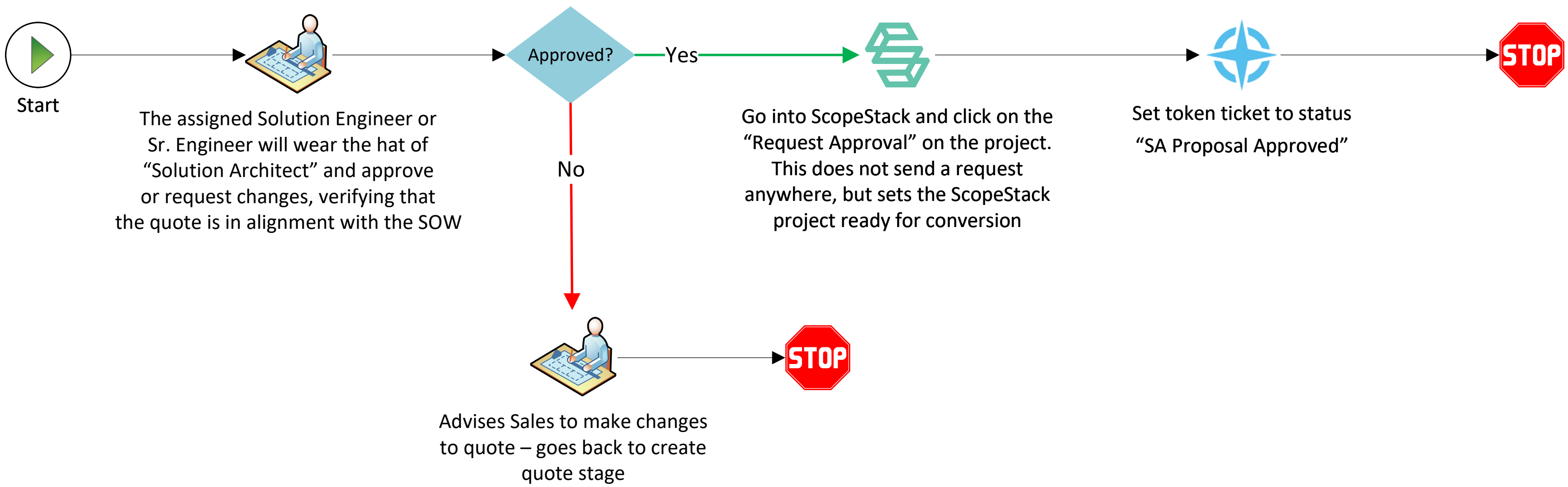
MN SE is using status "Sr Project Eng Review" during this step for tracking and review purposes
No
Start
SE reaches out to HD Lead Engineer/team (or a technical SME who knows the client well)
Scope labor and work breakdown structure using ScopeStack. SOW is also created using ScopeStack
SE reaches out to PM to ask who the Lead Project Engineer may be for this project
SE and Project Lead Engineer review ScopeStack project – LE accepts or SE makes additional updates – SE sets the project in ScopeStack to "Approved" when project is ready for quoting
LE accepts?
No additional updates needed – SE can create finished SOW and SE Worksheet
Yes
LE updates token ticket to advise SE that all looks good and there are no issues with the scoped work plan
SE completes SE Worksheet for products and adds in service dollars
SE adds SOW from ScopeStack to ticket for Sales to create quote
STOP
SLT: same day – 24 hours
This is a quick 5 minute phone call
SLT: 1-5 business days

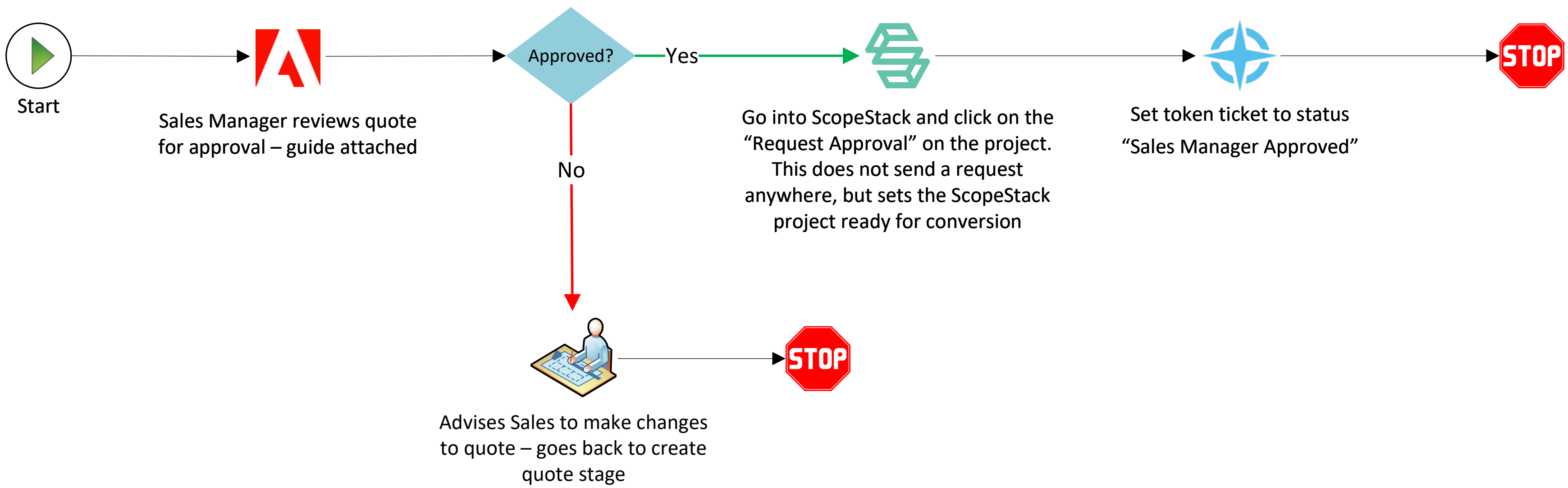

Start
Is client requesting to use flex credits for this fixed fee project?
No
Yes
Check flex agreement and confirm what is currently available (subject to change depending on timing of approval and project setup – this will again be confirmed by PM before project commences
MAKE SURE TOKEN TICKET CLEARLY STATES THAT CLIENT HAS REQUESTED FLEX CREDITS AND SOW BILLING SECTION HAS THE REQUESTED AMOUNT FILLED IN – NOTATE IN FINANCE SECTION OF NOTES IN TICKET AND NOTE TO PM
When quoting a nonprofit that we do not tax, you can unselect the "Is Tax Calculated" option in the "Quote Setup" tab
Create and set up project quote
When quoting – if you are going to quote a 5 year buyout or 5 year rental, you MUST have Sales Manager approval. You will see "Preapproval Required" in the options when quoting. A 5 year rental may be too long. You wouldn't take a 20 year loan for a car, right?
Existing MS client or new?
New
Existing MS
Build quote- new client
Build quote – existing MS client (includes impact to MS and flex credits)
Do you want to calculate monthly payments for GreatAmerica financing?
No
Yes
Use the GreatAmerica financing option to calculate potential monthly payments
Do you wish to have the quote document ONLY show the lease option amounts?
No
Use the Lease Only option for the quote document
Did anything change on the quote?
No
Yes
You will need to recalculate (go back and reimport the GA financing option)
You can add the MSA to the quote if this client has not yet signed one
Publish, deliver, and update the Opportunity
Ensure documents are attached to the Opportunity. Transfer the ticket for SA review
Do you need to create a new/ renewal MS agreement or a new hosted services agreement?
Yes
No
Go to Quote Managed Services process for new hosted service agreement; go to SBS for new/renewal MS agreement
Set ticket status to "Txfr>SA Approval Needed"
STOP

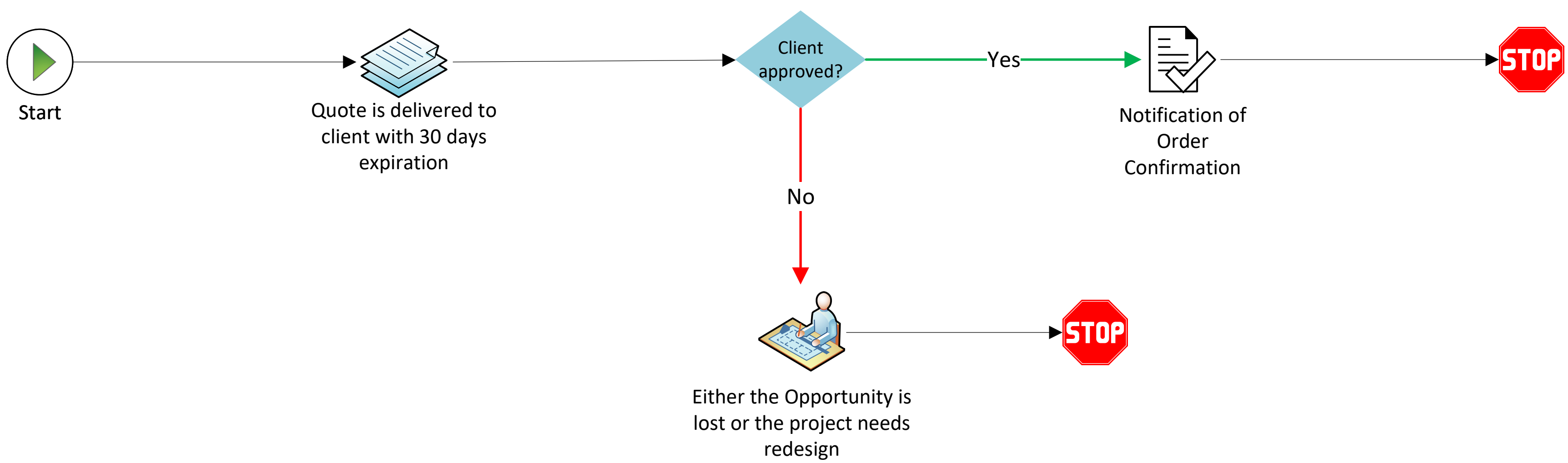


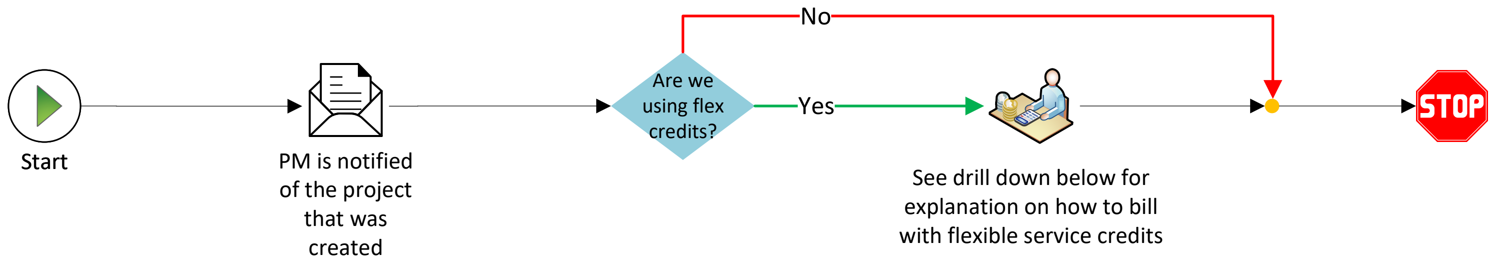
Set the Status, and save the Opportunity. This will use a ConnectWise API to send the information over to GreatAmerica to review for credit approval.
GreatAmerica will send back a Credit Status of either Approved or Denied.




Start
The assigned Solution Engineer or Sr. Engineer will wear the hat of "Solution Architect" and approve or request changes, verifying that the quote is in alignment with the SOW
Approved?
Yes
No
Go into ScopeStack and click on the "Request Approval" on the project. This does not send a request anywhere, but sets the ScopeStack project ready for conversion
Set token ticket to status "SA Proposal Approved"
STOP
Advises Sales to make changes to quote – goes back to create quote stage
STOP


Start
Sales Manager reviews quote for approval – guide attached
Approved?
Yes
No
Go into ScopeStack and click on the "Request Approval" on the project. This does not send a request anywhere, but sets the ScopeStack project ready for conversion
Set token ticket to status "Sales Manager Approved"
STOP
Advises Sales to make changes to quote – goes back to create quote stage
STOP


Start
Quote is delivered to client with 30 days expiration
Client approved?
Yes
Notification of Order Confirmation
STOP
No
Either the Opportunity is lost or the project needs redesign
STOP



1. Sales (AM, BDE, BTA) will set the expectation in quoting of what is available on the flex agreement at that time, noting that this is ESTIMATE only and will be confirmed at project creation/setup by the Project Manager. Procedure: Run the agreement reconciliation report available in ConnectWise at the time of quoting to communicate what is potentially available at that time.

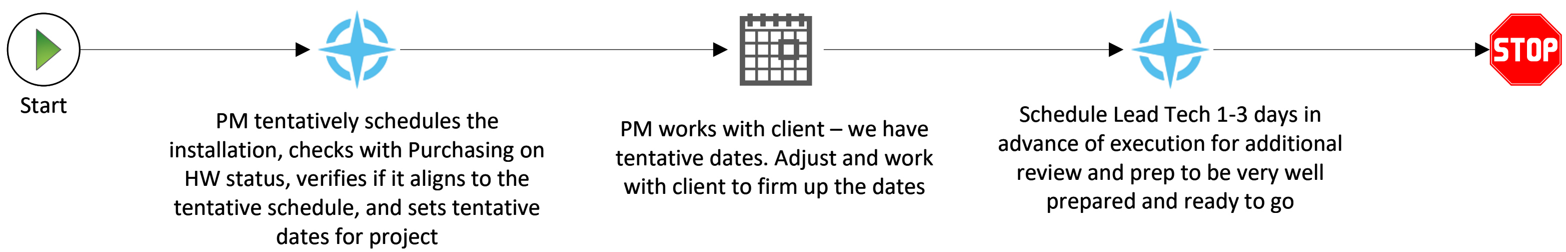
2. When creating the project from the won Opportunity, the Project Manager will add the product "PS:FixedFlexService" with price set to available flex hours at the project planning phase – the PM will re-run the flexible agreement reconciliation report and communicate with the client the available dollars at that time. Then the PM will add the "PS:FixedFlexService" product and the available dollars as the price. This will lock those dollars to that project at the moment the product is added with the dollars.

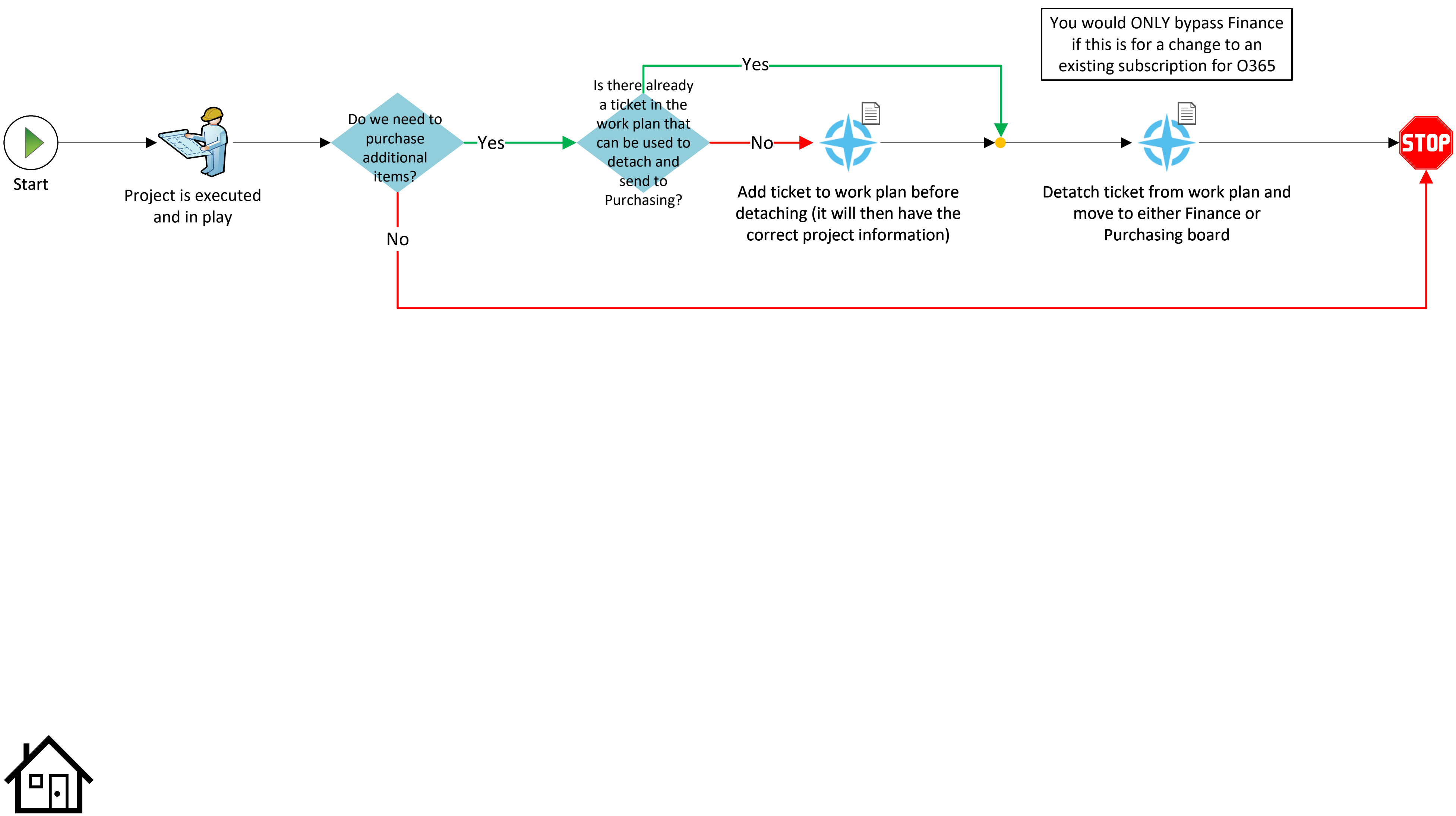
Example:
1. Quote is a fixed fee project of $5,000.00 and Sales states from the available flex service credits that the client has $4,000.00 available which would mean an invoice of $1,000.00 if $4000.00 in flex credits are used.

2. Sales communicates on the token ticket and in the SOW (see next proposed changes below) to the Project Manager that the client will be using flexible service credits so the PM will know to confirm with the client.

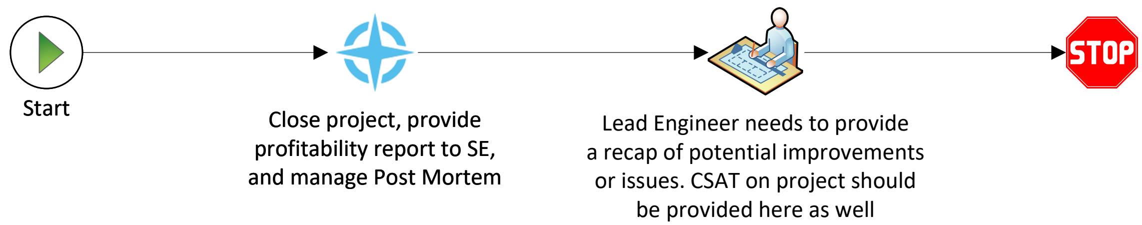
3. When the Project Manager receives the handoff of the project, they run the reconciliation report to know how much flex credit is available at that moment. In this example, the client now has $3,500.00 available

4. The Project Manager confirms with the client and then adds the "PS:FixedFlexService" product to the Project Products tab with the price at $3,500.00 and sets the fixed fee on the Finance tab to $1,500.00. Project will then bill at $5,000.00 and immediately reduce the flex service agreement by the 3,500.00 as it should.


Start
PM tentatively schedules the installation, checks with Purchasing on HW status, verifies if it aligns to the tentative schedule, and sets tentative dates for project
PM works with client – we have tentative dates. Adjust and work with client to firm up the dates
Schedule Lead Tech 1-3 days in advance of execution for additional review and prep to be very well prepared and ready to go
STOP



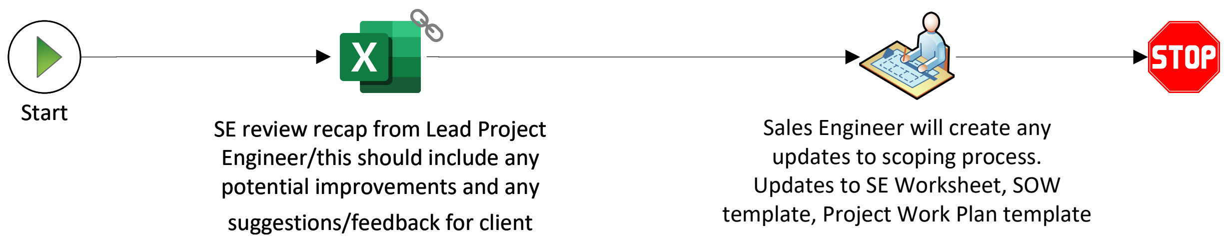
You would ONLY bypass Finance if this is for a change to an existing subscription for O365
Start
Project is executed and in play
Do we need to purchase additional items?
Yes
No
Is there already a ticket in the work plan that can be used to detach and send to Purchasing?
Yes
No
Add ticket to work plan before detaching (it will then have the correct project information)
Detatch ticket from work plan and move to either Finance or Purchasing board
STOP



Total Serv Rev:	**$10,000.00**		
Employee	**Total Hours by Member**	**Hourly Cost (this is the hourly cost in our Member setup in CW)**	**Total Cost**
John Doe (Tech)	50	$35.00	$1,750.00
Jim Doe (Tech)	10	$40.00	$400.00
Tom (PM)	6	$45.00	$270.00
Harold (SE)	8	$47.00	$376.00
		TOTAL COST:	**$2,796.00**

Profitability Calculation: **(Revenue - Cost)/Revenue**

(10000 -2796)/10000 **72.04%**


Start
SE review recap from Lead Project Engineer/this should include any potential improvements and any suggestions/feedback for client
Sales Engineer will create any updates to scoping process. Updates to SE Worksheet, SOW template, Project Work Plan template
STOP

Documentation			
SALES	**PROCESS DOCUMENTS**	**APPROVALS**	**VIDEOS**
Activity Definitions	SE Worksheet Template	Sales Manager and Professional Services Review and Approval Guide	GreatAmerica Financing Options in Quote and GA Approval
Opportunity Type and Forecast Definitions	SOW Template		
MSA Template	SOW Template for Workstations		
DocuSign (see DocuSign process for credentials)	SOW Template for Workstation Imaging Only		
Guidelines for Project Execution for Non-Managed Clients	Scoping Labor and Work Breakdown Structure with ScopeStack		
	Move or New Site Worksheet		
	S2P Handoff Summary Guide		
	SOP Create/Setup Project Quote in Sell		
	SOP Build Quote for New Client		
	SOP Look Up Agreement for Available Flex Credits and Update Billing in SOW		
	SOP Build Quote for Existing MS Client		
	SE Tracking		

Version	Date	Updated By	Requested By	Comments/References
22.01.14	1/14/2022	MLC		